

AROUND THE CLOCK, AROUND THE WORLD: OVERVIEW OF VIRTUAL REFERENCE SERVICE

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ABSTRACT: An overview of virtual reference efforts in the library community with a focus on those that may apply to future IAMSILC initiatives.

Reference services are under constant review and are impacted by ever changing resource delivery methods, e.g. delivery to us in the library. What has relatively recently occurred is an innovation in how we deliver the information we have gathered to the end user or patron who may no longer have to be standing in front of us or on the phone. Whether or not IAMSILC decides to offer a form of virtual reference would not only mean evaluating all the variables any library should consider but a number of questions unique to our organization some of which I will raise in the following discussion. The scope of this paper is only an overview but the references and web page sites I have gathered should expose the reader to the complexity of offering virtual reference service.

For clarification purposes I should define some of the terminology that is being used in the discussion of “virtual,” “online,” “electronic,” “e-mail,” “chat,” or “24/7” reference service. Virtual, online, and electronic reference can cover the others but the literature, thankfully, tends to be more specific when referring to e-mail, chat or 24/7. Chat and 24/7 usually means real-time interactivity between librarian and patron, but the level of interactivity may be dependant on the software used.

E-mail reference, as a service advertised by a library, has been around for a while. The Global Reference Network of the Library of Congress, which many may have heard of, is an e-mail reference service. Questions are routed based on the profiles provided by participating institutions. The Library of Congress announced this summer a collaborative effort with OCLC that is called QuestionPoint, which combines both e-mail and live online reference.

The University of Connecticut Libraries has had e-mail reference since 1996 and the present more sophisticated system since 1999. The questions asked can now be directed by the patron to subject specialists or as we call them, liaisons. E-mail reference provides little chance for an in-depth reference interview and may require an interchange of messages before the exact question is revealed. On the plus side, e-mail reference allows the librarian time to fully investigate a given question, does not require much added software, and can be more easily squeezed into a work schedule. It does not, however,

lend itself to teaching a patron how to find electronic resources in the future without detailed explanations of how to navigate a certain online resource. Turnaround time on e-mail reference can be days and for ready reference type questions some patrons will not have the patience, thus chat reference was born.

Chat reference is the method by which online 24/7 reference is delivered but may not necessarily mean around the clock service. At the University of Connecticut, within the last year, we have begun to offer a chat reference service, which is not 24/7 but has prescribed hours. I am responsible for one hour a week and my reaction is guarded optimism. Chat software capabilities range from the relatively simple, such as those in AOL's Instant Messenger, to those developed for online e-commerce, to those being refined specifically for reference service. In most of the software now available, and in use by libraries, there are added functions that greatly enhance simple text messages. Functions such as push capabilities and co-browsing allow the reference librarian to deliver more than URL's but push the actual pages to the user's computer and then browse the pages while the patron sees the activity on screen. The co-browsing provides the means by which some teaching can take place. I have not seen in the literature where the patron's browser choices are a large issue.

Chat, as a means of communication, has some limitations not dependant on software capabilities. Simple keyboarding skills are a factor as well as the time needed to type out a message explaining anything but the simplest of messages. With chat reference that is not controlled by some authentication method a good deal of time may be spent answering questions from outside your usual patron base. Another issue arises when dealing with requests outside of your usual community because many electronic resource vendors ask that you make some effort to keep non-institutionally affiliated individuals from using their resources. If you can push web pages and don't check for affiliation of the user, licensing could be an issue, but I have not read where vendors are asking for unusual measures, yet.

True 24/7 reference service requires a large commitment of time, training and people. One problem in the literature that I have mentioned is the loose use of the term, "24/7" but there are actually some who are providing 24 hour/7days a week/365 day a year reference service. One of the largest groups I've found is "24/7 Reference". Originally they were a project of the Metropolitan Cooperative Library System in California and assuming their web page is accurate the California State Library still administers the project. They continue to sign on new members and the Boston Library Consortium (BLC) has recently decided to join and has a task force working out the many details needed before implementing this service. Both Woods Hole and the University of Connecticut are members of BLC. The libraries or consortia that have signed on don't look to be international in scope but that doesn't surprise me because going international would add another level of complexity with language and time zone being immediate complications. The list of participating organizations is at: <http://www.247ref.org/communities.htm>.

Of course without being truly international there are going to be many hours when none of the participating libraries are open or staffed. Employees of the vendors who supply true 24/7 services advertise that “experienced reference librarians” will be available in the off hours to solve this problem. There is often a reciprocal virtual reference desk time commitment necessary from participating libraries. This raises the specter of outsourcing, which implies the question of quality of service. It may be that the type of questions that will be answered by the vendor’s staff will be limited and other questions are referred to local staff or that there are experienced reference librarians who wish to work off hours.

Costs for 24/7 reference software ranges from \$2,000 to \$15,000 to start and annual fees that can range from \$3,600 to \$6,000. These numbers are not actual quotes but culled from the literature and it should be noted that consortia seem to fare better. Also consortia may be necessary in order to deliver the service in the first place.

IAMSLIC’S UNIQUE SITUATION

IAMSLIC could be seen by some as an ideal organization to try and implement some form of formal virtual reference. We are international and could theoretically cover all 24 hours of a day. We could go so far as charging each participating library a minimal fee and using IAMSLIC monies in order to hire a person to cover gaps in coverage. We deal in specialized information, which means the demand may be manageable. We are committed to increasing access to information.

While virtual or 24/7 reference is not totally uncharted waters there are many questions that should be asked. What I have noticed throughout the literature is detailed planning and comprehensive training requirements.

Here are just a few things to consider before jumping on the virtual real-time reference bandwagon.

1. Language differences
2. Would such a service marginalize smaller libraries and their librarians?
3. Restrictions on uses of proprietary electronic resources
4. Authentication
5. Training
6. Lack of knowledge about someone else’s local species, shores or oceans

I believe the second point I made about marginalization of smaller libraries is perhaps the most sensitive but I include it in part because of the long standing discussion about ILL requests that used to come across the IAMSLIC listserv. If a smaller library wants to gain more resources and credibility having a good part of their service being provided by others could be detrimental.

It may be that the marine science community has already dealt with its specialized needs by developing networks of people who know each other and are willing to share information. I suspect that many researchers, in all fields for that matter, often bypass the library and go directly to the source of the information required. Marine science students pick up those same skills even though sometimes they are the ones who benefit the most from libraries.

Although failure, or offering a library service that is under used and not appreciated, is a learning experience I would expect IAMS LIC to take a long hard look at whether a virtual e-mail or real-time electronic reference service is the best use of their resources.

CONCLUSION

There are definite pros and cons to any virtual reference service. The most obvious drawback is the lack of person-to-person communication that can be non-verbal, or if verbal more subtle, fluid, and easier than the written word. I suspect that for the time being the limitations of chat as a method of communication, no matter how sophisticated the software, and the amount of teaching possible in an online setting will define the scope of the service. Ready reference and pointing patrons to useful electronic resources are obvious services that can be provided and they may be sufficient. So far reports on what kinds of questions are asked during live online reference sessions indicate a preponderance of inquiries about electronic resources.

Once the hyperbole of some articles on the subject is overlooked one can see where real-time electronic reference has a role in library services. There are many that have prophesized the demise of libraries or librarians because of technological change, but practicality usually rules the day. Software costs and staffing issues will make libraries very cautious, however, as with many things that evolve, real-time electronic reference could become a standard service. The risk is that technological capabilities are driving the concept faster than a library's staff can adjust, which would result in poor service but careful planning and training can solve that avoidable problem.

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Very nice site, with links to real time digital reference technology providers, libraries involved in virtual reference, a couple bibliographies on the subject.

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From the web site: The Virtual Reference Desk (VRD) is a project dedicated to the advancement of digital reference and the successful creation and operation of human-mediated, Internet-based information services. VRD is sponsored by the United States Department of Education, with support from the White House Office of Science and Technology Policy.

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